

Counsel Appointment System (CAS) Training and Reference Manual



Michigan Supreme Court
State Court Administrative Office

Michigan Court Rule 8.123

Counsel Appointments; Procedure and Records

(A) Applicability. This rule applies to all trial courts, which means all circuit courts, district courts, probate courts, and municipal courts.

(B) Plan for Appointment. Each trial court must adopt a local administrative order that describes the court's procedures for selecting, appointing, and compensating counsel who represent indigent parties in that court.

(C) Approval by State Court Administrator. The trial court must submit the local administrative order to the State Court Administrator for review pursuant to MCR 8.112(B)(3). The State Court Administrator shall approve a plan if its provisions will protect the integrity of the judiciary.

(D) Required Records. At the end of each calendar year, a trial court must compile an annual written or electronic report of:

- (1) the number of appointments given to each attorney by that court;
- (2) the number of appointments given to each attorney by each judge of that court;
- (3) the total public funds paid to each attorney for appointments by that court; and
- (4) the total public funds paid to each attorney for appointments by each judge of that court.

Trial courts that contract for services to be provided by an affiliated group of attorneys may treat the group as a single entity when compiling the required records of appointments and compensation.

The records required by this subrule must be retained for the period specified by the State Court Administrative Office's General Schedule 16.

(E) Public Access to Records. The records must be available at the trial court for inspection by the public, without charge. The court may adopt reasonable access rules, and may charge a reasonable fee for providing copies of the records.

(F) Reports to State Court Administrator. When requested by the State Court Administrator, a trial court must:

- (1) provide a copy of its most recent annual report; and
- (2) provide data on an individual attorney or judge for a period specified by the request.

(Current as of 3/01/2004)

Michigan Supreme Court
State Court Administrative Office

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Agenda

- Overview
- Who will Report
- Types of Appointment Systems
- What to Report
- When to Report
- How to Report
- Questions



11/9/2004

MCR 8.123 and Me

Getting to know your court rule!



11/9/2004

This Applies to Everybody!

The rule applies to all trial courts, meaning:

- All circuit courts
- All district courts
- All probate courts
- All municipal courts



MCR 8.123(A)

What Do YOU Have To Do?

- Each court must adopt an LAO for appointments
- Must be approved by SCAO
- Must keep records for:
 - Number of appointments given to each attorney by the court
 - Number of appointments given to each attorney by each judge of the court
 - Total public funds paid to each attorney for appointments by the court
 - Total public funds paid to each attorney for appointments by each judge of the court
- Must compile an annual written or electronic report
- Must provide public access without charge
- Must provide data upon request by SCAO

11/9/2004

We're Going to Make It Easier for You!

- Web-based reporting – may be by upload
- Input by P-numbers with automatic name retrieval for verification for both judges and attorneys
- Does not automatically reset judge
- Allows you to name contract groups and saves information for subsequent reports



11/9/2004

Who Will Report?

- Authorized users
- Same court breakdown as CRS



What To Do If You Have....

- More than one user
- More than one location or funding unit
- Family division appointments by probate judges



Types of Appointment Systems

- Contract with group of attorneys
- Multiple contracts with several attorneys
 - ◆ By rotation
 - ◆ By time period
 - ◆ By pre-determined number of cases
- Rotational List
- House Counsel
- Public Defender Office



What, Exactly, Should I Report?



Data Entry Topics

- Judge–Attorney Pair
- Appointments
- Amounts Paid
- Bindover Cases
- Indigency
- Record for Every Judge
- Attorney Groups



Judge - Attorney Pair

- Information should be attributed to a unique pair of one judge and one attorney
- Example of a Record –
 - ◆ Judge Judy, Attorney Alex,
10 Appointments, \$1,000 Paid



Appointments

- Report the number of appointments assigned to the attorney by the judge



Appointments

- Definition – An appointment should represent one case
- Example – Attorney Anne is appointed to represent the indigent client Martha Stewart in all charges against her. This is one appointment.



Appointments

- Exception – If attorney is assigned for a time period, the time period is the appointment.
- Example – Attorney Andy is appointed to represent all indigent clients in August. This is one appointment.



Clarification

- If your court contracts with attorney groups, the contract is not necessarily a time period. The number of cases assigned to the attorney group should be reported.



Appointments

- Definition – Report the appointments assigned to this attorney or group of attorneys by this judge, regardless of which judge hears the case.
- Example – Judge Jeff assigns Attorney Amy to represent Prisoner Paul. Judge Jeff retires the next day. The appointment should still be attributed to Judge Jeff.



Appointments

- Exception – If all appointments or a determined number of appointments are assigned through contract, the appointments and amounts paid should be attributed to the chief judge.
- Example – Motor County contracts with the Public Defender's Office to represent all indigent clients. All appointments and amounts paid should be attributed to Chief Judge Cathy.



Appointments

- Exception – If an undetermined number of appointments are assigned through a contract for an hourly rate or other variable and contractual attorneys are assigned on a rotational basis, attribute appointments to the judge making the appointment.
- Example – Motor County contracts with Attorney Alice to represent some indigent clients for \$50 per hour. Appointments made by Judge Jill to Attorney Alice should be attributed to Judge Jill.



Appointments

- Exception – If court staff or another department makes the appointments, the appointments and amounts paid should be attributed to the judge hearing the case.
- Example – Motor County's Executive Office appoints Attorney Abe to represent Poor Patty. Attribute the appointment and amounts paid to Judge Jason who hears the case.



Appointments

- Exception – If your LAO provides that appointments made by court staff or another department are reportable only for the chief judge, attribute the appointments and amounts paid to the chief judge.
- Example – Motor County's Executive Office appoints Attorney Abe to represent Poor Patty. SCAO approved the LAO which described why no one in Motor County can track which judge hears this case. Attribute these appointments and amounts paid to Chief Judge Carl.



Amounts Paid

- Definition – Report the dollar amount paid in the reporting year to this attorney or group of attorneys regardless of when the appointments were made.



Amounts Paid

- Definition – Report the dollar amount paid to this attorney or group of attorneys for the judge hearing the case, regardless of who made the appointment.



Amounts Paid

- Example - If a judge makes the appointments for another judge who hears the case, the amounts paid should still be attributed to the judge hearing the case.



Bindover Cases

- Example – District Court Judge Jeff assigns Attorney Amy to the case. The case is bound over to Circuit Court. Circuit Court Judge Joe hears the case and issues payment.
- Attribute appointment to Judge Jeff.
- Attribute amount paid to Judge Joe.



Indigency

- Report appointments and payments made to attorneys representing indigent parties
- Indigency is locally determined



Guardians Ad Litem

- Do not report guardians ad litem (GALs) in the Counsel Appointment System.



A Record for Each Judge

- A record for every judge is required, even if the judge did not make appointments or hear cases involving indigent parties.
- Enter zero's for judges in this situation.



Attorney Groups

- Court contracts with a group of attorneys or a public defender's office.
- Report appointments and amounts paid to the group, regardless of which attorneys represented the indigent parties.



When to Report

- Between January 1, 2005 and February 15, 2005, report appointments and payments made in 2004.
- And every year thereafter.



How to Report

- Accessing the System
 - ◆ Website
www.courts.mi.gov/mcap
 - ◆ Username and Password
- Manual Data Entry
- Electronic Upload



ReCap

- Every trial court, per MCR 8.123.
- Keep records on appointments and amounts paid. Refer to definitions and exceptions.
- Coordinate records and reporting within your court and county!
- Compile annual report for public.
- Submit to SCAO through web January 1 - February 15, 2005.



Questions and Answers

- Dawn - Who will Report and Why
- Laura - What and When to Report
- Andrea - How to Report



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Counsel Appointment System

Instructions and Definitions

TO ACCESS AND USE THE APPLICATION

Between January 1 and February 15 at least one authorized user from each court will have access to a web-based application to submit data related to attorneys appointed and paid during the previous calendar year. To access and use this application, you must be selected by the court administrator or chief judge, registered with the SCAO, and in possession of an SCAO-issued username and password. The usernames and passwords are confidential and should be securely stored.

TO SELECT A NEW AUTHORIZED USER

To add or replace the person authorized to use the Counsel Appointment System for your court, a signed Authorized User Request Form should be faxed to Margie Boerner at (517) 373-7517. If you have any additional questions about this form or the authorized users for your court, please contact Margie Boerner at (517) 373-1903.

ENTERING DATA

In selecting a court from the drop-down list, keep in mind that only one report can be submitted for each court. Multi-county courts, however, should submit separate reports. The list of courts will be identical to those available through the Caseload Reporting System.

Probate Courts that handle family division cases should report any appointments for the family division with the Circuit Court report.

APPOINTMENTS

Enter the number of appointments¹ assigned to this attorney by this judge².

Definition 1: An appointment should represent one case.

Exception 1.1: If your court assigns attorneys to serve for a time period, the time period is a single appointment, regardless of how many cases are handled by the attorney during this time period.

Definition 2: Report the appointments assigned to this attorney or group of attorneys by this judge, regardless of which judge hears the case.

Exception 2.1: If a determined number of appointments or all appointments are assigned through a contract to an attorney or group of attorneys, the appointments should be attributed to the chief judge.

Exception 2.2: If an undetermined number of appointments are assigned through a contract for the hourly rate or other variable and contractual attorneys are assigned on a rotational basis, the appointments should be attributed to the judge making the appointment.

Exception 2.3: If court staff or another department makes the appointments, the appointments should be attributed to the judge hearing the case.

Exception 2.4: If your LAO provides that appointments made by court staff or another department are reportable only for the chief judge, the appointments should be attributed to the chief judge, regardless of which judge hears the case.

Counsel Appointment System

Instructions and Definitions

AMOUNT PAID

Enter the dollar amount paid³ to this attorney by this judge⁴.

Definition 3: Report the dollar amount paid in the reporting year to this attorney or group of attorneys regardless of when the appointments were made.

Definition 4: Report the dollar amount paid to this attorney or group of attorneys for the judge hearing the case.

Exception 4.1: If a determined number of appointments or all appointments are assigned through a contract to an attorney or group of attorneys, the amounts paid should be attributed to the chief judge.

Exception 4.2: If an undetermined number of appointments are assigned through a contract for the hourly rate or other variable and contractual attorneys are assigned on a rotational basis, the amounts paid should be attributable to the judge hearing the case.

Exception 4.3: If your LAO provides that appointments made by courts staff or another department are reportable only for the chief judge, the amounts paid should be attributed to the chief judge, regardless of which judge hears the case.

A RECORD FOR EVERY JUDGE

At least one record must be submitted for each judge. If a judge did not make any appointments or pay any attorneys during the year, enter zeros in both the appointment and amount paid fields. It is not necessary to select an attorney.

AUTHORIZED USER REQUEST FOR WEB-BASED REPORTING SYSTEMS

Complete the following information for each individual who will be entering or uploading data into a web-based reporting system.

NOTE: Authorized users must be court employees and must have an e-mail address.

Name		Title
Court for whom data will be entered or uploaded (enter the appropriate court code, county name, and address)		
Telephone number (area code and extension)	FAX number (area code)	E-mail address
Name(s) of web-based reporting system(s) user will access		

Authorized by: _____
Signature

Name (type or print)

Title (Chief judge/Court administrator/Probate register)

Telephone number

Please return by FAX to: **State Court Administrative Office**
 Attn: Margie Boerner
 (517) 373-7517

File Format for the Submission of Electronic Counsel Appointment Data

Counsel Appointment System

1 Introduction

This document describes the record layout for submitting data electronically to the Counsel Appointment System (CAS). Data uploaded will be imported into an Oracle database, and that data will then be used for generating reports. Courts with a case management system may be able to create the data file with relative ease, but the data file must conform to the specified record layout in order for the application to understand the data and store it properly.

1.1 Submission Mechanism

The CAS will include web-based functionality to upload the data file via the web application, however a court must be connected to the public Internet or the Supreme Court intranet. The user attempting to submit the data file will sign on to an application using a web browser. The user will enter a drive, path, and filename to select the file to be submitted, and the application will transfer the file to a JIS server. The file will be processed and the data will be entered in a database. The user will then be able to view the submitted data using web-based data entry screens or output reports.

2 Electronic Data File Format

2.1 General Format

All data submitted electronically shall be in ASCII format, enclosed in quotes, and comma delimited; i.e., "xxxxxx", "xxxxxx", and so on. An empty field (") is considered null. Each record in the file will represent a single attorney or group. A record is a series of ASCII characters terminated with a carriage return-linefeed character. The elements of each record will identify which data value it represents, so that the year, court code, county, as well as the judge P number, attorney P number or group number, number of appointments, and monies paid combine to refer to a single record. This record layout will require data to be written out redundantly, but allows each record to be dealt with independent of any other record in the file.

2.2 Record Format:

The format shall be as follows:

"YEAR","COURT","COUNTY","JUDGE PNO","ATT PNO","APPTS","PAID"

2.2.1 Field Definitions

"YEAR"	= Report year "2004", "2005", etc.
"COURT"	= Court code
"COUNTY"	= County name that, along with the court code, identifies a specific court jurisdiction
"JUDGE PNO"	= P number of the judge making the appointments, preceded by a "P"

"ATTPNO" = P number of the attorney, preceded by a "P"; the group number, preceded by a "G", generated by the Group Maintenance screen to identify the attorney group; or 0 for judges who have not made any appointments
"APPTS" = Null value (""), or number of appointments made to the attorney or group
"PAID" = Null value (""), or monies paid (in whole numbers) to the attorney or group*

*Monies paid and appointments made, though given in the same year, are not necessarily related

Example: "2004","D26-1","Wayne","P11806","G135","143","568233"

The above example is for the year 2004, 1st election district of the 26th District Court ("D26-1"), the county of Wayne, Judge Raymond A. Charron, group number 135, with 143 appointments and monies paid totaling \$568,233.

This provides flexibility when submitting the data so that there are no expectations about groups of records; each one is considered independently. It is possible that probate, circuit, and district data can be intermixed, record by record, and that the values can be listed in no particular order regarding their judge, attorney, or group. This approach duplicates what might be considered header information on every detail line. We are increasing the size of the file in order to purchase flexibility for the courts that choose to create these electronic data files, as well as following the standard set forth by the Caseload Reporting System.

2.2.2 Field Names, Attributes, and Length:

<u>Field Name</u>	<u>Attributes</u>	<u>Max Length</u>
YEAR	Numeric	4
COURT	Varchar	5
COUNTY	Varchar	25
JUDGEPNO	P, followed by 5 digits	6
ATTPNO	P or G, followed by a maximum of 5 digits, or 0	6
APPTS	Numeric	5
PAID	Numeric	6

2.2.3 Submission of Files

The electronic files may be submitted repeatedly in order to correct or complete the data. If the APPTS or PAID field is missing, or has a null value (""), the submission will be accepted, and the data available will be processed.

Subsequent submissions will overwrite the existing values in the database unless the append feature is selected. However, if a field in the submitted file has a null value (""), it will be ignored and the existing value in the database, if any, will remain. Similarly, missing values in subsequent submissions will not affect existing values in the database. Any non-null values (zero or greater) will overwrite, or append to, existing data for that court, in that year, for that particular judge, and the particular attorney or group.

2.2.4 Judges without Appointments

All judges assigned to a court must be submitted. If a judge has not made any appointments, the record for that judge should be submitted with zeros for the attorney P number, appointments, and monies paid. Missing judges will be included in an exception report for that court.

1 Introduction

This User Guide and Specification was created by the State Court Administrative Office (SCAO) for the Counsel Appointment System (CAS). It is intended to document the functionality of the web application for end users and application programmers. This document lists each screen and describes its intent and navigation mechanisms, as well as what each data field represents and how it is to be used. In addition, it includes instructions for viewing and using the output reports.

2 Software Application Screens

2.1 Menu



Figure 1: Menu

2.1.1 Usage

The menu screen provides links to all other areas of the application along with a description of each area. Click on the underlined text to proceed to the desired section. The Appointment Verification option will be available between January 1 and February 15 of each year.

2.2 Court/Year Data Entry

Counsel Appointment System - Search by Court and Year - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Michigan Court Application Portal

Logout

Counsel Appointment System

Applications Options Verification Utilities

Welcome, Andrea Houser Help

Court/Year Data Entry

Court: D46 - Oakland Year: 2003

Continue

To report problems with the Michigan Court Application Portal, please visit our [Help Desk](#)

Done Trusted sites

Figure 2: Court/Year Data Entry

2.2.1 Usage

The courts available to the user will appear in the drop down list. Select the court by typing the court code, using the up and down arrow keys, or clicking on the court. Tab to or click on the Year field to change the year. Pressing the Enter key or clicking the Continue button will proceed to the next screen.

2.2.2 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the courts the user may enter data for.	Required. As the user types, the selection will move to the court that matches the keys typed.
Year	Accepts a 4-digit year.	Required. The previous year is displayed by default, however the user is able to enter any year between 2004 and the previous year (i.e. In 2007, the user may enter any year between 2004 and 2006).
Continue Button	Proceeds to the next screen using the court and year values entered.	Triggered by pressing the Enter key or clicking the button.

2.3 Counsel Appointment Data Entry

Counsel Appointment System - Appointment Entry - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Michigan Court Application Portal [Logout](#)

Counsel Appointment System

Applications Options Verification Utilities

Welcome, Andrea Houser [Help](#)

Counsel Appointment Data Entry

☒ **Data Entry - Add a new record to the Counsel Appointment System**
☐ **Filter - Enter criteria to define what records are displayed in the table below**

Court: D46 - Oakland Year: 2003

Judge P No:

Attorney P No: OR Attorney Group:

Appointments: Amount Paid:

	Judge	Attorney / Group	Appointments	Amount Paid
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Delete"/>	Stephen C. Cooper	Rebecca Ann Abraham	<input type="text" value="2"/>	<input type="text" value="\$400"/>
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Stephen C. Cooper	Heather A. Bale	2	\$400
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Susan M. Moiseev	Rebecca Ann Abraham	5	\$750
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Susan M. Moiseev	Daniel Arm	1	\$200
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Susan M. Moiseev	Heather A. Bale	1	\$200
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Shelia R. Johnson	Ronald M. Anstandig	2	\$550
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	Shelia R. Johnson	Heather A. Bale	3	\$500

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Figure 3: Counsel Appointment Data Entry

2.3.1 Usage

Add a Record:

Note: Data entry is available from January 1, through February 15, of each year. Select the Data Entry radio button if it is not already selected. Enter the judge's p number using numbers only. Tab to the next field and enter the attorney's p number using numbers only, or tab again to the Attorney Group list and type, arrow up or down, or click on a group name. Tab to the Appointments field and enter a number, and then tab to the Amount Paid field and enter a number. Pressing the Enter key or clicking the Add button will add the record to the database and display it in the table.

Edit or Delete a Record:

If necessary, follow the instructions for filtering records to locate the record to be edited or deleted. Click the Edit button to the left of the record to be modified and then enter the new number of appointments and/or amount paid. When finished, click Save to keep the changes, or Cancel to discard the changes. To delete a record click the Delete button to the left of the record to be removed. When prompted, click OK to confirm the delete or Cancel to keep the record.

Filter Records:

Select the Filter radio button if is not already selected. Enter the judge's p number using numbers only. Tab to the next field and enter the attorney's p number using numbers only, or tab again to the Attorney Group list and type, arrow up or down, or click on a group name. At least one field must be entered. Pressing the Enter key or clicking the Filter button will search for records matching the criteria entered and display them in the table.

2.3.2 Screen Element Descriptions and Usage

Name	Description	Usage
Data Entry	Allows the user to enter new counsel appointment data.	Displays the full set of data entry fields and moves the cursor to the Judge P No field.
Filter	Allows the user to enter criteria and perform a search for matching records.	Displays only the Judge P No, Attorney P No, and Attorney Group fields and moves the cursor to the Judge P No field.
Judge P No ¹	Allows the user to enter the judge's 5-digit p number.	Required for data entry. Accepts only 5-digit numbers for judges who have been elected to, assigned to, or visited the court at some point. When the user tabs or clicks off this field the judge's name is displayed below.
Attorney P No ^{1,2}	Allows the user to enter 0 or the attorney's 5-digit p number.	Accepts only 5-digit numbers for valid attorneys or 0. When the user tabs or clicks off this field the attorney's name is displayed below.
Attorney Group ^{1,2}	Lists the attorney groups for the court.	As the user types, the selection will move to the group that matches the keys typed.
Appointments ³	Allows the user to enter the number of appointments.	Accepts either null, or a number between 0 and 99999.
Amount Paid ³	Allows the user to enter the amount paid.	Accepts either null, or a number between 0 and 999999.
Add Button	Saves the record to the database and displays it in the table.	Displayed for data entry and triggered by pressing the Enter key or clicking the button.
Filter Button	Performs a search for records matching the criteria entered.	Displayed when the filter is on and triggered by pressing the Enter key or clicking the button.
Edit Button	Allows the user to modify the appointments and/or amount paid for a single record.	Displays the Save and Cancel buttons, as well as the Appointments and Amount Paid text fields for the record.
Save Button	Saves the modifications to the database.	Hides the Save and Cancel buttons, and updates the record in the table.

Name	Description	Usage
Cancel Button	Discards any modifications made to the record.	Hides the Save and Cancel buttons, and returns record to its previous state.
Delete Button	Deletes the record from the database.	Prompts the user to confirm the deletion and then removes the record from the table.

¹One or two of these fields must be entered when using the filter feature: Judge P No, Attorney P No, and Attorney Group; however both Attorney P No and Attorney Group cannot be entered at the same time.

²Attorney P No or Attorney Group must be entered when adding a record; however both cannot be entered at the same time.

³Either Appointments or Amount Paid may be left blank when entering data; however a value must be entered at some point before the deadline or the court will not be able to submit a Counsel Appointment Verification form.

2.4 Upload Data Files

The screenshot shows a web browser window titled "Counsel Appointment System - Upload Data Files - Microsoft Internet Explorer". The page header includes the Michigan Court Application Portal logo and navigation links: Applications, Options, Verification, Utilities, and a Logout link. The user is logged in as "Andrea Houser". The main heading is "Upload Counsel Appointment Data Files". A note states: "Note: Please read the instructions to assist you in determining whether you need to append or overwrite counsel appointment data." The form displays the user's contact information: "Contact Name: Andrea Houser" and "Phone: 517-373-0130". Below this is a text input field containing "G:\Counsel Appointments\PCAS.txt" and a "Browse..." button. There is an unchecked checkbox labeled "Append". At the bottom of the form are "Upload" and "Cancel" buttons. A footer note says: "To report problems with the Michigan Court Application Portal, please visit our [Help Desk](#)". The browser's status bar at the bottom indicates "Trusted sites".

Figure 4: Browse for File to Upload

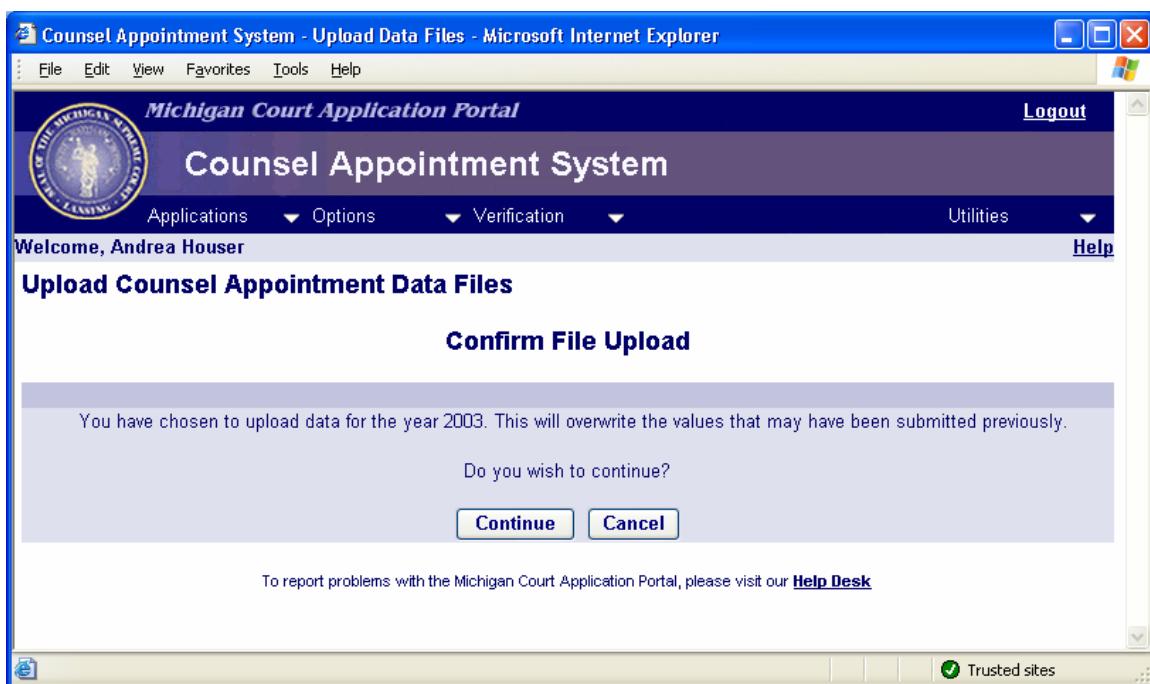


Figure 5: Confirm Overwrite or Append

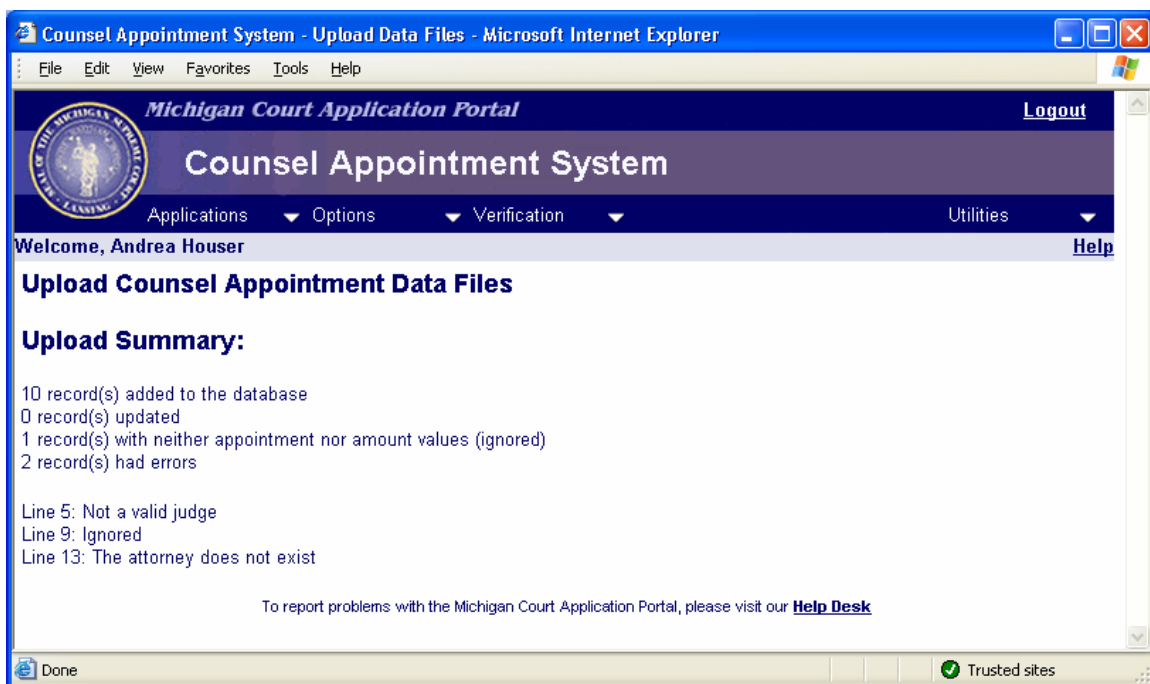


Figure 6: Upload Results

2.4.1 Usage

Note: Uploading is available from January 1, through February 15, of each year. For instructions on how to properly format the text file, please see "File Format for the

Submission of Electronic Counsel Appointment Data”, distributed by the SCAO.

Click the Browse button, navigate to and select the properly formatted .txt file to upload. Check the Append box if data should be appended to any existing data, otherwise the data will be overwritten. Pressing the Enter key or clicking the Upload button will begin the upload process. When prompted, click Continue to proceed with the upload or Cancel to abort the upload. The results of the upload will be displayed when the upload process is complete. If errors are reported, the erroneous data may be fixed and the file uploaded again; however in cases where the Append box was checked, it is recommended that modifications be made through the Data Entry screen.

2.4.2 Screen Element Descriptions and Usage

Name	Description	Usage
Browse...	Allows the user to navigate to and select the file to upload, or type in the path to the file.	Clicking the button opens the Choose File dialog box. Selecting a file displays the path and file name in the text field.
Append	Allows the user to add the values in the uploaded file to existing values in the database.	If checked, values in the uploaded file are added to existing data in the database. Left unchecked, values in the uploaded file overwrite any existing data in the database.
Upload Button	Begins the upload process and proceeds to the upload confirmation page.	Reads the first line of the file in order to display the year for which the data is being uploaded.
Continue Button	Continues the upload process and saves each valid record to the database.	Displays a count of records processed.
Cancel Button	Cancels the upload process and does not save any data to the database.	Returns the user to the Upload Data Files screen.

2.5 Group Maintenance



Figure 7: Group Maintenance

2.5.1 Usage

The courts available to the user will appear in the drop down list. Select the court by typing the court code, using the up and down arrow keys, or clicking on the court. When a different court is selected, the attorney groups for that court will be displayed. To add a new attorney group, type in the group name and then click the Add button. To edit a group name, click the Edit button to the left of the attorney group, type in the new name, and then click Save to keep the changes or Cancel to discard the changes. To delete an attorney group, click the Delete button to the left of the attorney group. When prompted, click OK to confirm the delete or Cancel to keep the attorney group. Deleting an attorney group prevents it from being entered for future counsel appointment data; however it will be displayed for previously entered data.

2.5.2 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the courts the user may enter data for.	As the user types, the selection will move to the court that matches the keys typed. Changing the court will display attorney groups for that court.
Group Name	Allows the user to enter a new attorney group name.	A maximum of 30 characters may be entered.
Add Button	Saves the attorney group to the database.	Displays the new attorney group in the table.
Edit Button	Allows the user to modify the group	Displays the Save and Cancel buttons, as

Name	Description	Usage
	name.	well as the Group Name field.
Save Button	Saves the modifications to the database.	Hides the Save and Cancel buttons, and updates the group name in the table.
Cancel Button	Discards any modifications made to the attorney group.	Hides the Save and Cancel buttons, and returns group name to its previous state.
Delete Button	Deletes the attorney group from the database.	Prompts the user to confirm the deletion and then removes the attorney group from the table.

2.6 Exception Reports

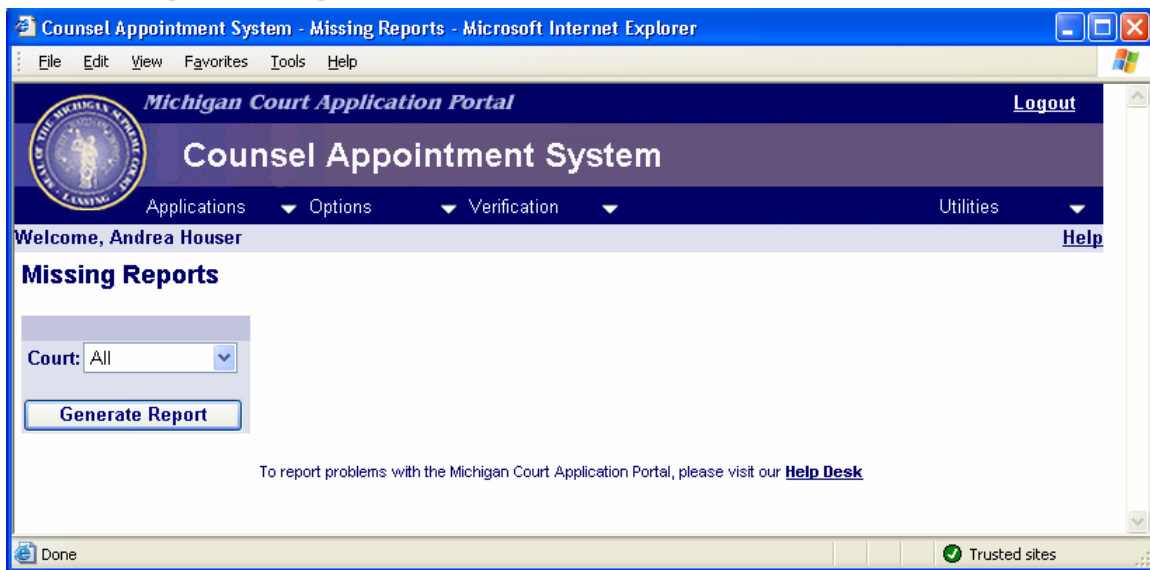


Figure 8: Exception Report Court Selection



Figure 9: Exception Report Output

2.6.1 Usage

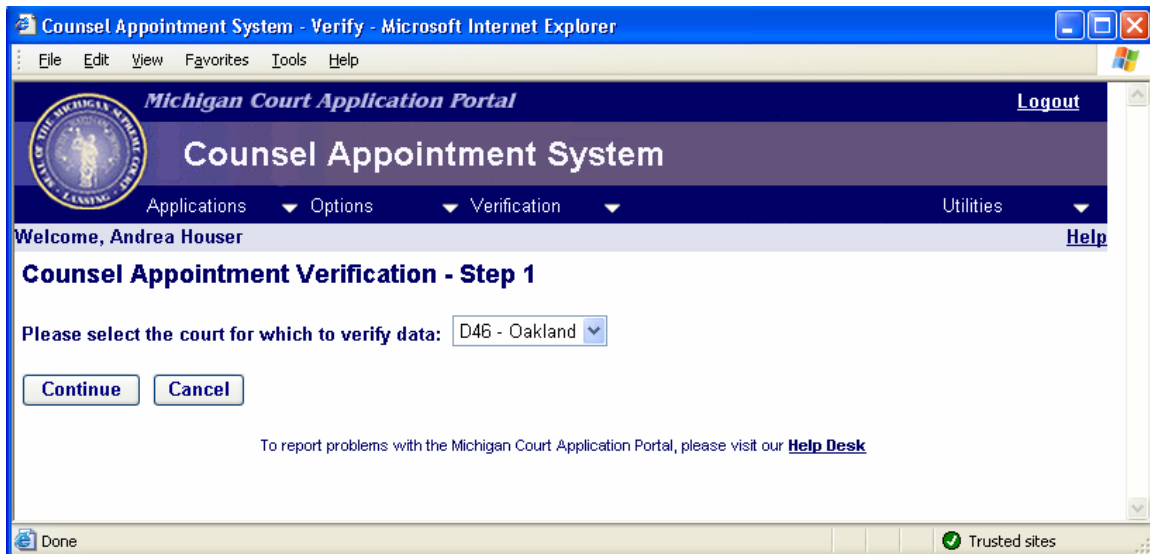
The courts available to the user, along with an “All” option, will appear in the drop down list. Select the option desired by typing, using the up and down arrow keys, or clicking on the option. The “All” option will display missing data for all courts available to the user. Pressing the Enter key or clicking the Generate Report button will proceed to the next screen.

On the proceeding screen, the judges’ names and p numbers are displayed for each court selected. The judges displayed are those that were elected to, assigned to, or visited the court during the previous year, but do not have any appointment data entered. A judge that has not made any appointments must have an entry of zeros for attorney, appointments, and amount paid, or the judge will appear in the exception report.

2.6.2 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the courts the user may view exception reports for.	As the user types, the selection will move to the court that matches the keys typed.
Generate Report Button	Proceeds to the next screen using the court(s) entered.	Triggered by pressing the Enter key or clicking the button.

2.7 Verification Form



Counsel Appointment System - Verify - Microsoft Internet Explorer

Michigan Court Application Portal

Logout

Counsel Appointment System

Applications Options Verification Utilities

Welcome, Andrea Houser Help

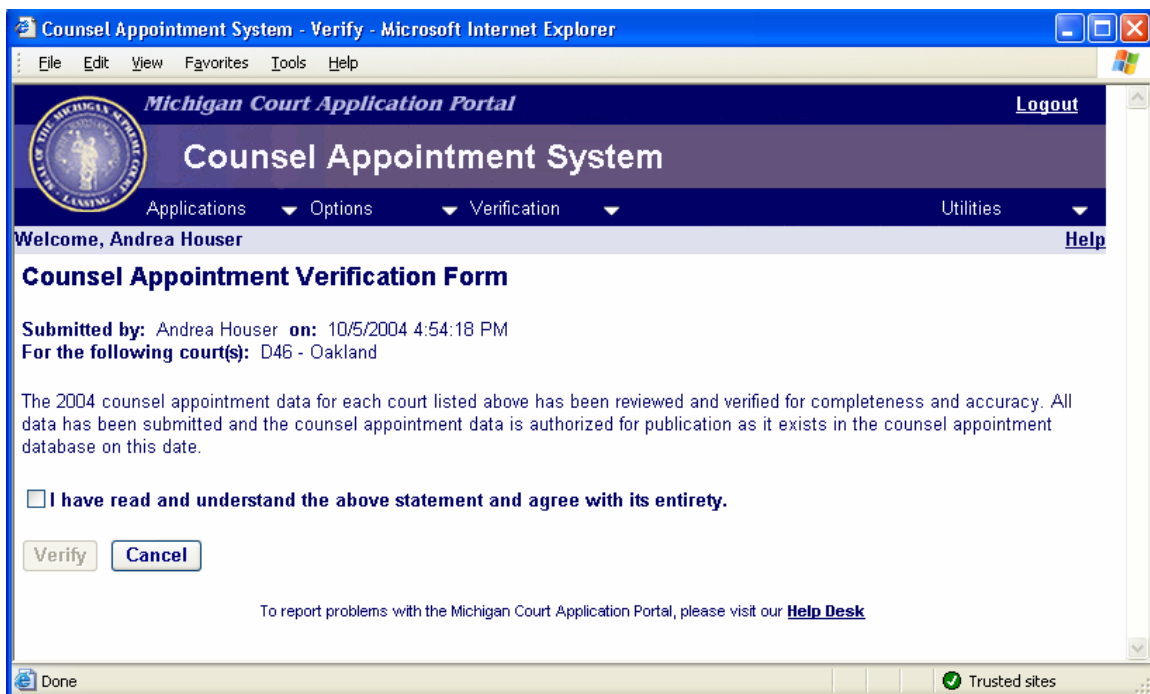
Counsel Appointment Verification - Step 1

Please select the court for which to verify data: D46 - Oakland

Continue Cancel

To report problems with the Michigan Court Application Portal, please visit our [Help Desk](#)

Figure 10: Verification Court Selection



Counsel Appointment System - Verify - Microsoft Internet Explorer

Michigan Court Application Portal

Logout

Counsel Appointment System

Applications Options Verification Utilities

Welcome, Andrea Houser Help

Counsel Appointment Verification Form

Submitted by: Andrea Houser on: 10/5/2004 4:54:18 PM
For the following court(s): D46 - Oakland

The 2004 counsel appointment data for each court listed above has been reviewed and verified for completeness and accuracy. All data has been submitted and the counsel appointment data is authorized for publication as it exists in the counsel appointment database on this date.

☐ I have read and understand the above statement and agree with its entirety.

Verify Cancel

To report problems with the Michigan Court Application Portal, please visit our [Help Desk](#)

Figure 11: Verification Form Submission

2.7.1 Usage

The courts available to the user will appear in the drop down list. Select the court by typing the court code, using the up and down arrow keys, or clicking on the court. Pressing the Enter key or clicking the Continue button will proceed to the next screen. To cancel the verification process, click the Cancel button.

On the proceeding screen, read the statement and check the box verifying that the statement is true. Clicking the Verify button will send an e-mail to the Chief Judge and Court Administrator or Probate Register informing them that the counsel appointment data has been verified for that court. Verification will not be successful if any records are blank for appointments or amount paid. To cancel the verification process, click the Cancel button.

2.7.2 Screen Element Descriptions and Usage

Name	Description	Usage
Court	Lists the courts the user may verify counsel appointment data for.	As the user types, the selection will move to the court that matches the keys typed.
Continue Button	Proceeds to the next screen using the court entered.	Triggered by pressing the Enter key or clicking the button.
Cancel Button	Cancels the verification process.	Returns the user to the menu screen.
Verify Checkbox	Confirms that the user has reviewed and verified counsel appointment data for the court.	Checking the box will enable the Verify button.
Verify Button	Sends an e-mail to the Chief Judge and Court Administrator or Probate Register informing them that the counsel appointment data has been verified for that court.	Redirects the user to a screen that informs the user if the verification succeeded or failed.

2.8 Output Report Parameters

Counsel Appointment System - Enter Report Parameters - Microsoft Internet Explorer

Michigan Court Application Portal

Counsel Appointment System

Applications Options Verification Utilities

Welcome, Andrea Houser

Logout

Help

Enter Report Parameters

Report: By Judge

Court: C06 - Oakland

Year: 2003

Submit

To report problems with the Michigan Court Application Portal, please visit our [Help Desk](#)

Figure 12: Output Report Parameters

2.8.1 Usage

The reports and courts available to the user will appear in the drop down list. Select the options for both Report and Court by typing, using the up and down arrow keys, or clicking on the option. Tab to or click on the Year field to change the year. Pressing the Enter key or clicking the Submit button will load the report on the following screen.

2.8.2 Screen Element Descriptions and Usage


Name	Description	Usage
Report	All Data: Displays data in column format; useful for exporting. By Attorney: Displays data grouped by attorney. By Judge: Displays data grouped by judge.	As the user types, the selection will move to the report that matches the keys typed.
Court	Lists the courts the user may view data for.	As the user types, the selection will move to the court that matches the keys typed.
Year	Accepts a 4-digit year.	Required. The previous year is displayed by default, however the user is able to enter any year between 2004 and the previous year (i.e. In 2007, the user may enter any year between 2004 and 2006).
Submit Button	Loads the report selected in the next screen using the court and year values entered.	Triggered by pressing the Enter key or clicking the button.


3 Output Reports


3.1 ActiveX Viewer

The Crystal Reports ActiveX Viewer must be installed in order to view the reports. When prompted to download and install the viewer, click OK. If there is no prompt and the report does not display, download and install the viewer from <http://courts.mi.gov/mcap/help/downloads>.

3.2 Usage

Group Tree: To expand or contract the group tree, click the group tree icon ()

Export: To export the report, click the export icon () . Select the file format (Crystal Reports (RPT), Acrobat Format (PDF), MS Word, MS Excel 97-2000, or Rich Text Format) and the page range, and then click OK.

Print: To print the report, click the printer icon () and then click OK.

Navigate: To navigate through the report, click the following icons:




to move to the previous or next record

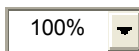


to move to the first or last record



to go to a specific page number, enter a page number in the field to the left of the icon and then click the icon

Search: To search for text in the report, enter the text in the field to the left of the search icon () , and then click the icon.

Zoom: Select the percentage to zoom in or out from the drop down ().

<u>YEAR</u>	<u>COURT_NAME</u>	<u>JUDGE_NAME</u>	<u>ATTY/GROUP</u>	<u>APPTS</u>	<u>AMOUNT_PAID</u>
2004	3rd Circuit Court	Honorable Christopher D. Dingell	Joseph A. Alex	6	1,100.00
2004	3rd Circuit Court	Honorable Frances Pitts	Joseph A. Alex	8	2,300.00
2004	3rd Circuit Court	Honorable James E. Lacey	Joseph A. Alex	1	100.00
2004	3rd Circuit Court	Honorable Leslie Kim Smith	Joseph A. Alex	2	300.00
2004	3rd Circuit Court	Honorable Michael M. Hathaway	Joseph A. Alex	8	2,750.00
2004	3rd Circuit Court	Honorable Patricia B. Campbell	Annette R. Aisner	2	300.00
2004	3rd Circuit Court	Honorable Patricia B. Campbell	Joseph A. Alex	9	2,625.00
2004	3rd Circuit Court	Honorable Patricia B. Campbell	Ronald D. Ambrose	12	2,300.00
2004	3rd Circuit Court	Honorable Sheila Gibson Manning	Joseph A. Alex	4	1,625.00
2004	3rd Circuit Court	Honorable Sheila Gibson Manning	Ronald D. Ambrose	3	775.00

2004 Counsel Appointments

<u>Attorney/Group</u>	<u>Appointments</u>	<u>Amount Paid</u>
3rd Circuit Court		
Honorable Christopher D. Dingell		
Joseph A. Alex	6	\$1,100.00
Total	6	\$1,100.00
Honorable Frances Pitts		
Joseph A. Alex	8	\$2,300.00
Total	8	\$2,300.00
Honorable James E. Lacey		
Joseph A. Alex	1	\$100.00
Total	1	\$100.00
Honorable Leslie Kim Smith		
Joseph A. Alex	2	\$300.00
Total	2	\$300.00
Honorable Michael M. Hathaway		
Joseph A. Alex	8	\$2,750.00
Total	8	\$2,750.00
Honorable Patricia B. Campbell		
Annette R. Aisner	2	\$300.00
Joseph A. Alex	9	\$2,625.00
Ronald D. Ambrose	12	\$2,300.00
Total	23	\$5,225.00
Honorable Sheila Gibson Manning		
Joseph A. Alex	4	\$1,625.00
Ronald D. Ambrose	3	\$775.00
Total	7	\$2,400.00
All Judges		
Annette R. Aisner	2	\$300.00
Joseph A. Alex	38	\$10,800.00
Ronald D. Ambrose	15	\$3,075.00
Grand Total	55	\$14,175.00

Note: The attorney or group receiving the greatest number of appointments is highlighted in yellow and the attorney or group receiving the greatest amount of money from this court is highlighted in green.

2004 Counsel Appointments

<u>Judge Name</u>	<u>Appointments</u>	<u>Amount Paid</u>
3rd Circuit Court		
Annette R. Aisner		
Honorable Patricia B. Campbell	2	\$300.00
Total	2	\$300.00
Joseph A. Alex		
Honorable Christopher D. Dingell	6	\$1,100.00
Honorable Frances Pitts	8	\$2,300.00
Honorable James E. Lacey	1	\$100.00
Honorable Leslie Kim Smith	2	\$300.00
Honorable Michael M. Hathaway	8	\$2,750.00
Honorable Patricia B. Campbell	9	\$2,625.00
Honorable Sheila Gibson Manning	4	\$1,625.00
Total	38	\$10,800.00
Ronald D. Ambrose		
Honorable Patricia B. Campbell	12	\$2,300.00
Honorable Sheila Gibson Manning	3	\$775.00
Total	15	\$3,075.00
All Attorneys/Groups		
Honorable Christopher D. Dingell	6	\$1,100.00
Honorable Frances Pitts	8	\$2,300.00
Honorable James E. Lacey	1	\$100.00
Honorable Leslie Kim Smith	2	\$300.00
Honorable Michael M. Hathaway	8	\$2,750.00
Honorable Patricia B. Campbell	23	\$5,225.00
Honorable Sheila Gibson Manning	7	\$2,400.00
Grand Total	55	\$14,175.00